The Army Training Help Desk

The ATHD Federation Standing Operating Procedures

Key Elements of the SOP

- Purpose
- Responsibilities
- Workflow Rules and Procedures
- Response and Closure Standards
- Frequently Asked Questions
- Reports

Purpose of the SOP

- To establish operational procedures and delineate responsibilities for the conduct of Customer Assistance Operations throughout TRADOC. This SOP applies to all Army Training Help Desk Federation Partners
- This SOP is a living and breathing document. Your suggestions and recommendations to improve it are needed as the ATHD expands across TRADOC

ATHD Manager Responsibilities

- Managers:
  - Exercise supervisory control over all Customer Assistance (CA) areas and monitor operator proficiency through periodic reviews of Agent Incident Reports and transactions.
  - Ensure that all agents comply with the basic business/workflow rules, and response/closure standards as listed in this document.
  - Adhere to this SOP when developing individual center SOP’s to ensure common practices throughout the ATHD community.

ATHD Agent Responsibilities

- Agents:
  - Monitor the system during duty hours to ensure a timely response is provided to the customer.
  - Follow/comply with the basic business/workflow rules, and response/closure standards as listed in this document.
  - Recommend Frequently Asked Questions (FAQ's) based upon individual knowledge and expertise as well as identifying questions that meet the criteria for becoming a FAQ.
  - Initiate an Incident Report on ALL telephonic requests for assistance.
  - Inform the appropriate Manager of all CA activities that can be improved upon and any shortcomings.
  - Support all CA efforts as they apply to the ATHD Mission of providing timely and consistent assistance regardless of the nature of the question; eliminate gaps between help desks and provide 24/7 support and maximize efficiency & effectiveness.
  - Track the status of all assigned Incident Reports daily.

ATHD Workflow Rules & Procedures

(Methods of Generating an Incident Report)

- Web – A customer initiates an incident report from the ATHD website. Incidents will be automatically assigned a queue and the customer will be sent a preliminary response by the system. The incident may then be reassigned by the manager or pulled from the queue by an agent for response. The initial response from the agent to the customer will either inform the customer that their request for assistance has been sent to an SME and/or it will contain a solution set (it may contain both).
- Email – A customer initiates an incident report by emailing one of the federation partners. Incidents will be automatically assigned a queue and the customer will be sent a preliminary response by the system. The incident may then be reassigned by the manager or pulled from the queue by an agent for response. The initial response from the agent to the customer will either inform the customer that their request for assistance has been sent to an SME and/or it will contain a solution set (it may contain both).
- Telephone – A customer initiates an incident report by calling one of the federation partners directly. The agent who accepted/received the call will automatically initiate an incident report. The agent will then solve the customer's problem and close the incident after entering the solution set. If incident requires the attention of a SME, post the customers issue and send a response to the customer that the request for assistance has been sent to an SME).

ATHD Workflow Rules & Procedures (Escalation Rules)

- Escalation rules are created to ensure no incident is left unsolved for too long a time period. They are a tool the manager can use to see if there are any problems with getting answers to customers promptly. The following are 3 key elements of an escalation rule:
  - The standard escalation rules are executed after creation of an incident report, i.e. 3 days, 6 days, and 9 days
  - Escalation rules are not designed to be punitive in nature
  - Escalation rules are a tool to assist management to determine if an incident report should be elevated to the next higher level (Tier 1-3)

ATHD Workflow Rules & Procedures (Manager/Agent Accounts)

- Initial agent accounts will be created as needed. Managers are required to provide the necessary documentation required to initiate an account in the ATHD system.
- When an agent leaves, the ATHD administrator needs to be notified so the agent can be removed from the system. Also, provide the following information for the agent's replacement (provide same information for new hires):
  - Full Name.
  - Email Address – preferably a .mil address.
  - Telephone number for agent.
  - Primary area of responsibility and any other areas the agent will be responsible for providing assistance in.
  - Type of access needed
    - Agent
    - Knowledge Engineer
    - Manager
    - Other – provide an explanation
- Should an agent go on leave or is ill for more than one business day; notify the ATHD administrator to have the agent's account disabled until their return. If the agent is the only agent in a given area of responsibility, the manager must provide a temporary replacement and supply the above information to have the replacement's account started (replacements must be an existing agent or must have received agent training)

ATHD Response and Closure Standards

- The following Response and Closure Standards have been mandated by TRADOC:
  - One hour for automated response (email/web). Automatic message sent from system.
  - Telephone response - Telephone inquires will be handled/maintained at each respective FCAC element during their normal duty hours (Don’t forget to initiate an Incident Report)
  - Tier 1: One (1) business day initial response (man in the loop response). (1 Business day equates into 24-72 hour initial response based in weekend lag.)
  - Tier 2: Four (4) business days for closure. (4 Business days equates to 4-6 calendar days based in weekend lag.)

ATHD Frequently Asked Questions (FAQ's)

- FAQs will be reviewed for content and subject matter accuracy prior loading into the system. Once loaded, ATSC will make a final check for 501 compliance issues and other possible problems. The following fields are required when creating a new FAQ:
  - *Summary* – a brief synopsis of the problem being addressed in the FAQ. Example: "AIMS-PC Retrieve Student Grade Book"
  - *Question* – detailed description of the problem. Example: "Is there a way I can retrieve a student grade book after the student has been deleted from the course?"
  - *Answer* – viable, complete solution set to the problem. Example: "No, if the student has been deleted from the course their entire record is also deleted permanently. There is no "undo" function in the course or class management module to retrieve a record."
  - *Keyword* – include any keyword(s) to ensure matching customer's questions correctly. Example: "AIMS-PC, Grade Book, Gradebook, retrieve, deleted, student."
  - *Categories* – at least one category/sub-category below must be selected. (Categories/Sub-Categories will be added when needed or as new schools/proponents are added to the database.)
  - *Hyperlink* – yes or no answer if hyperlinks exist. This also includes email addresses.
  - *Notify Subscribers* – how often do you want customers to be notified of a change in the FAQ? Immediately, the end of the day, end of the week, or the end of the month.

ATHD Reports and Report Time Frames

- There are two types of reports available with the ATHD; Standard and Custom.
- All requests for reports will be sent to the ATHD Systems Administrator, The Systems Administrator is Mr. Mike Roenne; he may be contacted at Michael.Roenne@atsc.army.mil

ATHD Reports and Report Time Frames

- Standard Reports:
  - The RightNow software package offers a wide variety of standard reports. Requests for these reports need to be submitted to the system administrator or customer assistance manager prior to noon each business day to receive the report the same day (exceptions will be handled on a case-by-case basis.) Each request will include:
    - Federation Parnter Name.
    - Name of Standard Report
    - Name(s) of individual(s) report will be sent to.
    - Email address(es).
    - Dates reports are needed.
- The next few slides show a list of the standard reports available to Managers.

ATHD Reports and Report Time Frames (Standard Reports)

- Agent Reports
  - Agent Activity
  - Agent Effectiveness
  - Agent Login
  - Agent Performance
  - Agent Transactions
- Email Reports
  - Email by Age
  - Profile of Email

ATHD Reports and Report Time Frames (Standard Reports)

- Incident Reports
  - Open Incidents
  - Activity
  - Incident Creation
  - Incident Effectiveness
  - Incident Performance
  - Incident Trend
  - Incidents Created
  - Profile of Incidents
  - Age
  - Edit Time by Incident
  - Incidents Created and Resolved

ATHD Reports and Report Time Frames (Standard Reports)

- Knowledge Base Reports
  - Information Gaps
  - Questions Avoided
- Queue Reports
  - Max Wait in Queue
  - Queue Activity
  - Queue Effectiveness
  - Queue Incidents
  - Queue Performance

ATHD Reports and Report Time Frames (Standard Reports)

- Site Reports
  - Answer Notifications
  - Answers Viewed
  - Keyword Search
  - Operations Dashboard
  - Service Summary
  - Session Tracking
  - Site Effectiveness

ATHD Reports and Report Time Frames (Custom Reports)

- Reports will be generated and formatted based upon requests from ATHD Managers. Suspense's for reports will allow for a reasonable amount of time to respond to the request based upon the complexity of the report
- As a minimum, all requests for reports will have:
  - The requesting location.
  - A valid email address for reports to be sent (if individual has no access to system).
  - Telephone number.
  - What report will entail? (What data is required, desired format, etc.)
  - Report time frames: What period covered, is this a recurring report, when is the report needed, etc.

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Questions?